Test Team

NEW LOOK

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JIRA (Workflow)

Workflow

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Workflow

A JIRA workflow is the set of ***statuses*** and ***transitions*** that an issue goes through during its lifecycle.

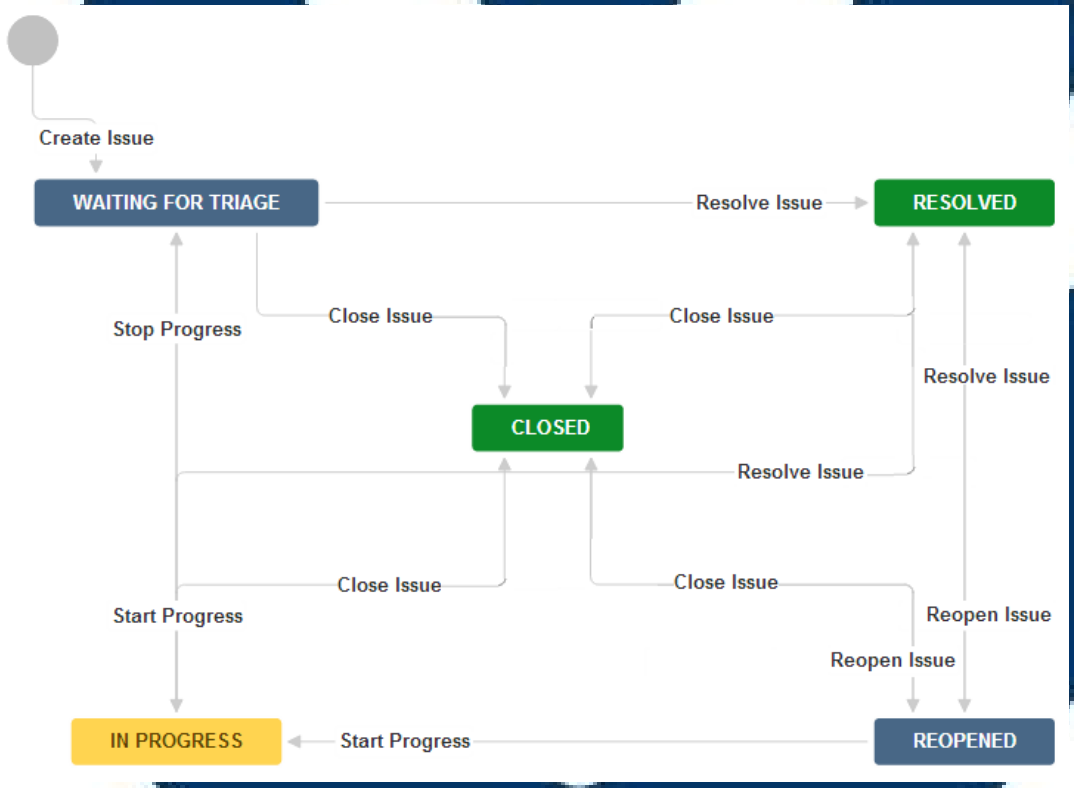
Workflows typically represent business processes.

JIRA ships with a built-in workflow called *jira*, which is the default system workflow and cannot be edited.

However, you can make copies of this workflow to get started creating your own workflows quickly. You can also create your own workflows from scratch, or import them from Atlassian Marketplace, if you prefer. Each workflow you create can be associated with particular

projects and, optionally, specific issue type(s) by using a workflow scheme.

JIRA's default system workflow



In JIRA, Workflows are assigned based on

- Project
- Issue Type

This means that **each issue type** can have a different workflow – A JIRA instance with hundreds of projects could have hundreds of different workflows.

Workflows consist of two key concepts:

- States
- Transitions

As a JIRA user, whenever you progress an issue into a new state you are completing a transition.

What is a status?

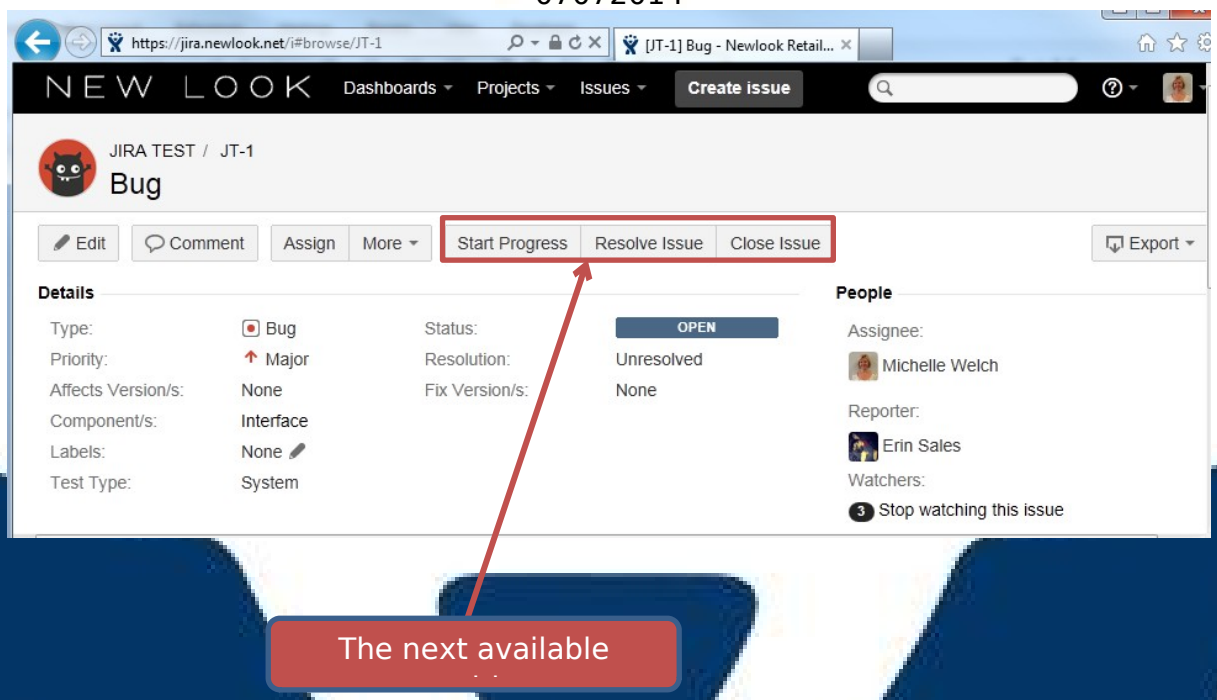
A status represents **the state of an issue** at a particular point in a specific workflow. An issue can be in only one status at a given point in time.

When defining a status, you can optionally specify *properties*.

What is a transition?

A transition is **a link between two statuses** that enables an issue to move from one status to another. In order for an issue to move between two statuses, a transition must exist.

A transition is a *one-way* link, so if an issue needs to move back and forth between two statuses, two transitions need to be created. The available workflow transitions for an issue are listed on the **View issue screen,** shown here.



Editing a workflow

Editing a workflow means that you are modifying the *statuses* and *transitions* that make up a workflow. There are slight differences between editing an **inactive** and an **active** workflow, described below. We place restrictions on the modifications you can make to an active workflow, due to the impact the changes will have on projects and/or issue types that use this workflow.

Active vs. inactive workflows

An ***inactive workflow*** is a workflow that is not currently being used by any projects. Because there are no issues currently transitioning through an inactive workflow, you can simply edit the workflow's steps and transitions.

An ***active workflow*** is a workflow that is currently being used by one or more projects. When you edit an active workflow, JIRA first creates a draft of it.

You can then modify the draft as you see fit. Once you have finished modifying your draft workflow, you can publish your draft and, optionally, save your original workflow as an inactive backup.

Limitations when editing an active workflow

Please note that the following limitations apply when editing an active workflow (i.e. a draft workflow):

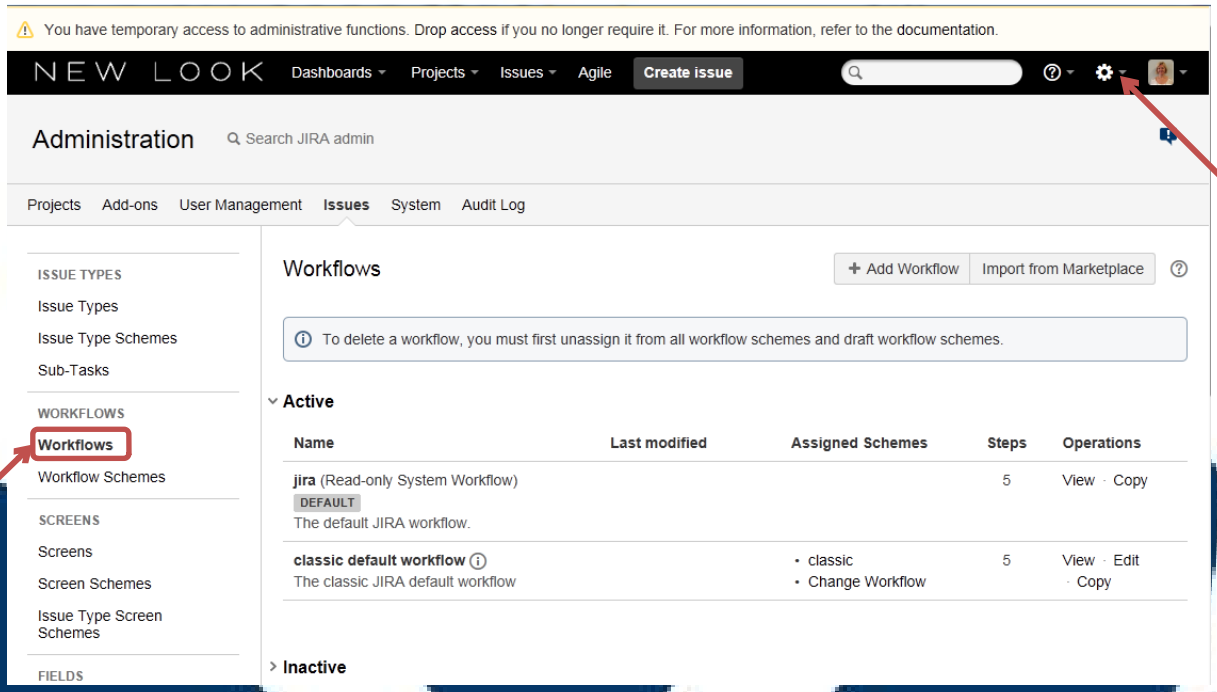
- It is not possible to edit the workflow name (only the description) if a workflow is active.
- Workflow statuses cannot be deleted.
- If a status has no outgoing transitions (Global transitions are not considered), it cannot have any new outgoing transitions added, regular or global.
- The step ID cannot be changed. See the following article for details on this: Cannot Add Transitions or Delete Steps in Draft Workflows.

If you wish to make any of the modifications listed above, then you will need to copy the workflow, modify the copy and then activate it.

Configuring a workflow

Creating a workflow from an existing workflow

- Log in as a user with the **JIRA Administrators** global permission.
- Choose > **Issues**. Select **Workflows** to open the Workflows page, which displays all of the workflows in your system.



- Copy an existing workflow using the **Copy** link in the Operations column (shown above).
  - Enter a name and description for your workflow.
  - Click the **Copy** button. The workflow opens in *edit* mode.
- Once you have created your new workflow, you may customize it by adding and/or editing steps and transitions.

Creating a workflow from scratch

(*For advanced administrators)*

- Follow Steps 1 and 2 as described above (in "*Creating a workflow from an existing workflow*").

- At Step 3, click the **Add Workflow** button instead of copying an existing workflow.
- Enter a name and description for your workflow. Click the **Add** button. The workflow opens in edit mode and contains a step called **Open**. If you are viewing your workflow in **Diagram** mode, you see an incoming transition called **Create**.
- Continue with your workflow customizations, by adding and editing steps and transitions.

Activating a workflow

Workflows need to be activated to use them in JIRA. Activating a workflow is the process of mapping the workflow to a workflow scheme, and then associating the workflow scheme with a project.

A workflow scheme defines a set of associations – or mappings – between a workflow and an issue type. Workflow schemes are associated with a project and make it possible to use a different workflow for every combination of project and issue type.

To activate a workflow:

- Log in as a user with the **JIRA Administrators** global permission.
- Create a workflow scheme or find an existing workflow scheme. See Configuring workflow schemes for instructions.
- Configure the workflow scheme to use your workflow. See Configuring workflow schemes for instructions.

- Associate your workflow scheme with a project, as described in the Associating a workflow scheme with a project section below.

Setting the Resolution field

Within JIRA an issue is determined to be **Open** or **Closed** based on the value of its **Resolution** field — not its **Status** field.

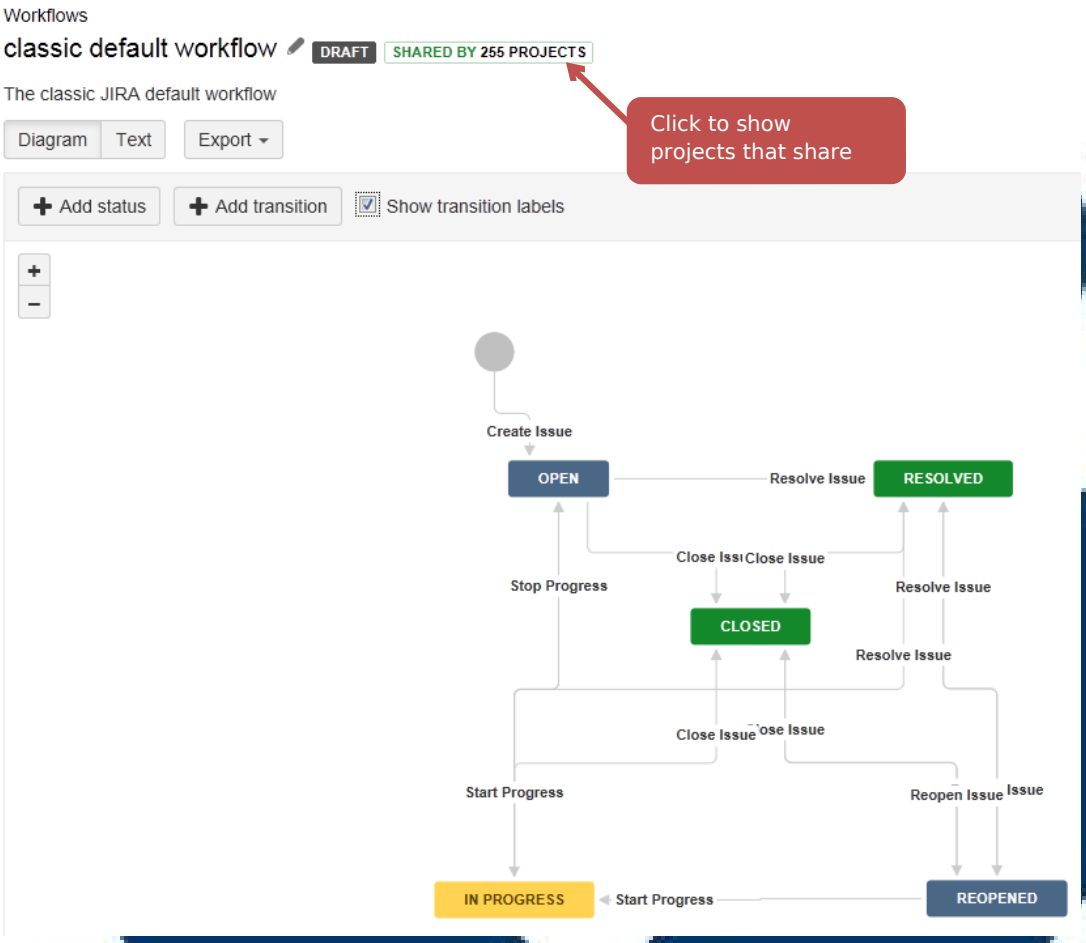
- An issue is determined to be **Open** if its **Resolution** field has not been set.
- An issue is determined to be **Closed** if its **Resolution** field has a value (e.g. **Fixed**, **Cannot Reproduce**).

Editing a project's workflow for the first time

Whenever a new JIRA project is created, your project automatically uses the default workflow scheme, which associates all available issue types in the project with the JIRA system workflow. Since neither the JIRA system workflow nor the default workflow scheme are editable, JIRA creates an editable copy of the system workflow and workflow scheme for your project.

Workflow designer

Workflow designer, also referred to as **Diagram edit mode**, allows you to visualize the entire layout of your workflow as well as create and edit a workflow's steps and transitions.



Statuses in the workflow designer

There are a number of different actions you can perform with statuses in the workflow designer. You can add a status via the toolbar at the top of the workflow designer. Also, if you select a status, extra information and actions become available in the *Properties* panel that displays on the right-hand side of the screen.

- **Add status** – click the **Add status** button in the toolbar. You will be able to choose from a list of existing statuses or enter a new status.
- **Remove a status** – via *Properties* panel. Removes the status from the workflow, but *not* the JIRA instance.
- **Move the status on the screen** – click and drag the status to reposition it in the diagram. Geometric snap lines appear to help you align the status with other statuses in the workflow.
- **Edit properties** – via *Properties* panel. Properties are advanced configurations on a workflow. Please see Workflow properties for details.
- **Add a global transition** – via *Properties* panel **(Allow all status to transition to this one)**. Global transitions are transitions that allow every other status in the workflow to transition to the selected status.

> **Note**
> Statuses are global objects in JIRA. Changing the name of a status on one workflow also changes the name of the status on all workflows that use that status.

Workflow Viewer on the 'View Issue' Screen

You can also see a read-only view of the workflow from the 'View Issue' page — just click the '**View Workflow**' link against the 'Status' field.

The workflow viewer also highlights the current status of your issue in the workflow.

> **Note**
> A new permission called '**View (Read-Only) Workflow**' is required to access the workflow viewer feature from the 'View Issue' page.

Configuring workflow schemes

A workflow scheme defines a set of associations – or mappings – between a workflow and an issue type.

Workflow schemes are associated with a project and make it possible to use a different workflow for every combination of project and issue type.

By default, projects use JIRA's system workflow. The default workflow scheme:

- Associates JIRA's system workflow *jira* with all issue types (available to the JIRA project).
- Appears as **Default Workflow Scheme** in JIRA (or just **Default** in the context of workflow scheme selection dropdown menu).

Adding a workflow scheme

- Log in as a user with the **JIRA Administrators** global permission.
- Choose **> Issues**. Select **Workflow Schemes** to open the Workflow Schemes page.
- Keyboard shortcut: **g + g +** start typing **workflow schemes**
- Click the **Add Workflow Scheme** button.
- Enter the **Name** and **Description** of the new workflow scheme.
- Click the **Add** button. The new workflow scheme is created.

- Follow the instructions in Configuring workflows for a workflow scheme below.

To associate a workflow scheme with a project:

- Log in as a user with the **JIRA Administrators** global permission.
  In some cases, JIRA will drop you out of administration mode. To get back, click the **Administer Project** button on the top right.

- Choose **> Projects**. The **Project Summary** page is displayed. Keyboard shortcut: **g + g +** start typing **projects**
- Click **Workflows** on the left of the **Project Summary** page (you can also click the **More** link in the **Workflows** section in the middle of the screen). The **Workflows** page is displayed, indicating the current workflow scheme used by the project.
- Click the **Switch Scheme** link to display the **Associate Workflow Scheme to Project** page.
- Select the relevant workflow scheme from the **Scheme** list and click the **Associate** button to begin the migration process.

To configure the workflow scheme associated with a project:

- Log in as a user with the **JIRA Administrators** global permission.

    - Choose **> Projects**. (Keyboard shortcut: **g + g +** start typing **projects)**
- Select a project from the displayed list.
- Click **Workflows** on the left of the **Project Summary** page. The **Workflows** page is displayed, indicating the current workflow scheme used by the project.
- Configure the issue types for the workflow scheme as desired.
    - This is not the same as editing the workflow (clicking the **Edit** button in the workflow diagram at the centre of your screen). If you do that you will be asked to publish your *draft workflow scheme*.
- At the **Publish Workflows** screen, click **Associate** to begin the migration process. Each issue has to be in a valid status. The valid statuses for an issue are defined by its workflow. This means that when changing a workflow, you may need to tell JIRA the status for specific issues after the change.
- A screen displays that indicates the progress of migrating all the project's issues to the updated scheme's workflows.
- Click **Acknowledge** to finish the process. A message displays letting you know that 'your workflows have been published.'

Each issue has to be in a valid status. The valid statuses for an issue are defined by its workflow. This

means that when changing a workflow, you may need to tell JIRA the status for specific issues after the change.

A screen displays that indicates the progress of migrating all the project's issues to the updated scheme's workflows.

- Click **Acknowledge** to finish the process. A message displays letting you know that *your workflows have been published*.

You can associate a single workflow scheme with more than one project although, only one workflow scheme can be associated with a given project.

The issue type scheme associated with a project defines the issue types that are available to that project. If an issue type is